

Subtask 2.4 – New Homes Partner Webinars

, The Contractor shall develop and conduct two (2) to three (3) specific, New Homes topical presentations or webinars to assist WaterSense partners in supporting and implementing the New Homes program as provided in Technical direction from the WACOR. The presentations shall be approximately 1 to 1.5 hours in length and will be web-based. The contractor shall set up the logistics for each call using web-based conferencing software and insure that participants receive all logistical information. The content for the presentations shall be developed in conjunction with activities in work assignments WA B-01 and B-05. The contractor shall take notes during the webinar and provide a meeting summary to the EPA TM within one month of the webinar. For planning purposes, the number of presenters will vary depending on the topic with presenters being from partner organizations, EPA staff and contractor personnel. It is estimated that at minimum one presenter shall be provided for each webinar.

Subtask 2.5 –Recruitment & Support of Local Promotional Efforts

The Contractor shall provide support to EPA to recruit and support builder partners for the new homes program. This recruitment will be national with a particular focus on multifamily builders/developers and on target communities identified by EPA. A national recruitment strategy using existing partners and challenge efforts may be phased in to this effort over time if needed. This assistance shall take the form of finalizing a recruitment rollout plan, which should be based on research gathered under Subtask 1.1 and collaboration with the TM and WACOR. The strategies shall include overarching goals and specific strategies, activities, and timelines for achieving those goals. The TM will provide input on the overarching goals, but the Contractor shall be responsible for identifying strategies, activities, and timelines for achieving those goals and all technical direction will be provided by the WACOR. Previous examples of this type of work include the 2010 Partner Outreach Work Plan developed under EP-C-09-008 WA 1-03.

Examples of potential goals may include, but are not limited, to the following: identifying and working with influencers in the industry to promote WaterSense to builders, providers and HBAs, increase WaterSense visibility in the residential new construction marketplace, identify builders/providers/HBAs who are already interested in green building or water efficiency to become WaterSense partners, and use Web 2.0 strategies to increase awareness of the new homes program. Specific activities shall include, but are not limited to:

- a. The Contractor shall support quarterly one (1) -two (2) hour calls and/or webinars with interested builders/providers/HBAs to discuss the certification and labeling process. The Contractor shall identify the appropriate stakeholders to participate, give recommendations on agenda items and develop a preliminary draft presentation for the calls. The Contractor may be asked to set up and/or participate in the call or webinar per direction by the TM.

The Contractor shall support approximately ten (10), one (1) hour long, telephone calls, online webcasts, and meetings with utilities, local/state government, and other key local/state water conservation organizations to thoroughly introduce and incorporate WaterSense's new homes program into a community's water conservation efforts. WaterSense anticipates select stakeholders will request support in initiating and developing

local promotions. Based on previous requests/interactions, the Contractor shall submit a brief (one (1) page) strategy recommending which stakeholders to work with in the event that none request help. The Contractor shall respond to Helpline requests from these interested communities (assume three (3) to five (5) communities) to support the development of local programs and campaigns. Responses may include developing tools to assist in media outreach including Q&As, articles, press releases etc. Responses shall also include, but are not limited to: strategy development, community tools, logistics support for one to two outreach/media events, one half-day workshop for partners, and one public announcement per promotional community. Logistical support for the workshops may include developing agendas, power point presentations, and other materials to support the meeting. The Contractor may be asked to participate in the workshop, and if so may be asked to take notes and provide a meeting summary to the EPA TM within one (1) month of the workshop. The Contractor may be asked to set up and/or participate in the call or webinar per technical direction from the WACOR.

If required, the contractor shall secure meeting space for WaterSense New Homes meetings as directed by the WACOR. If required, all conditions of section V.D (below) must be met before any related expenses occur. Meeting space shall include but is not limited to the rental of a room, audio-visual equipment, and sound equipment.

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, shall be obtained by the EPA WACOR and contract level COR as needed and provided to the Contracting Officer. Work under conference related activities and expenses shall not occur until this approval is obtained and provided to the CO. Conference related purchases are not expected to exceed \$20,000 under this contract. OWM will provide an executed EPA Form 5170. All additional costs must be approved by the Contracting Officer before they are incurred.

- b. Based on the recent momentum from ongoing collaborations with ENERGY STAR, Indoor airPLUS (IAP) and Habitat for Humanity Metro Denver, WaterSense would like to continue the targeted recruitment of other Habitat affiliates and other affordable housing builders, providers and agencies/stakeholders. The contractor will propose and then develop tools and materials to support the recruitment of affordable builders as well as recommendations for coordinating with Habitat for Humanity at the local, regional and national levels. These tools may include, but are not limited to: community tools, regional case studies, webinars, fact sheets, Q&As, blog or article templates etc. The contractor shall plan on developing no more than three (3) – five (5) tools under this section.

Subtask 2.6 – Update New Homes Content on the Public Website

The Contractor shall develop content for the WaterSense website as provided in technical direction from the WACOR. Web content development for updates will likely be needed to update the pages relating to new homes that are geared towards the consumer, builder/provider partners and other stakeholders that can't partner with WaterSense (i.e. inspectors and realtors.) The content is anticipated to consist of updates of current text on pages and the creation of entirely new pages. All web content shall comply with section 508

and other EPA's Office of External Affairs and Environmental Education (OEAAE) guidelines. The Contractor shall develop text for approximately one (1) major, and possibly two (2) – three (3) minor web updates/postings of one (1) to two (2) web pages each throughout the period of performance.

Task 3: Outdoor Sector Support

All activities listed in this task are contingent upon direction from the WACOR. The objective of this task is to provide support for the Outdoor Sector of the WaterSense program. This task involves: strategic planning for the outdoor sector (sub-task 3.1), support for the professional certification labeling program (sub-task 3.2), support for outreach on outdoor water-efficiency (sub-task 3.3), and conference travel (sub-task 3.4).

Sub-Task 3.1: Strategic planning for the Outdoor sector

The contractor shall support the development of a plan to guide the future direction of WaterSense's outdoor sector. In coordination with the WACOR, the contractor shall revisit the existing programmatic goals and identify any changes or additions needed. Then, the WACOR and contractor shall identify short and mid- term activities to achieve the goals. Planning should encompass all areas of the outdoor sector, including but not limited to, labeled product, programs and new homes support, professional certifications, and changing consumer perceptions. For planning purposes, the final plan should be no more than five (5) pages long.

Sub-Task 3.2: Support for the Professional Certification Labeling Program

The WaterSense program requires a set of competent professionals to install and promote WaterSense services and labeled products in the marketplace. At this time, the WaterSense has released a WaterSense Professional Certification Program Labeling System and three (3) specifications to label programs in the irrigation field. The Contractor shall provide support to review applications, support Professional Certifying Organization (PCO) partners, and administer the program. See below for details:

a. Review applications for PCO approval and labeling programs: The contractor shall develop protocols for the review of applications for PCO approval and to label a program. The Contractor shall process and review both types of applications according to these protocols. This shall include: answering questions from the applicant while they are preparing the application, acknowledging receipt of the application, reviewing the application based on the requirements outlined in the WaterSense Professional Certification Program Labeling System and appropriate specification, communicating with the applicant about any areas that need additional information, and providing a summary of the strengths and deficiencies of the application to the WACOR. The Contractor shall then submit this summary to the WACOR for approval or disapproval. Upon WACOR approval or disapproval of an application, the Contractor shall notify the applicant of the decision. The Contractor can expect four (4) – six (6) applications for PCO approval and six (6) – nine (9) applications to label programs. The Contractor shall keep the WACOR informed of all new applicants and the progress of the application review.

b. PCO Partner Support: The Contractor shall provide support to newly approved and existing PCO partners. This support shall include on-boarding newly approved PCOs. The

Contractor shall communicate with new PCO partners to properly acclimate these organizations to their newly acquired role. Communication shall include, but not be limited to, an explanation of proper label use, the WaterSense Partner Resource website and the relevant resources available, expectations for sending program information to certified professionals, the quarterly and annual reporting requirements, and soliciting feedback on support needed from WaterSense. For planning purposes, the Contractor can expect four (4) – six (6) new PCOs and six (6) – eight (8) new adopting PCOs. In addition, the contractor shall coordinate communication with the PCO partners including soliciting feedback on ways WaterSense can best provide partner support and the dissemination of WaterSense outdoor water use and irrigation information to all PCO partners on a regular basis. This may include such activities as educating PCOs about the outdoor requirements in the new homes specification, collecting feedback on campaign materials, encouraging participation in outdoor related campaigns, and coordinating to disseminate information to certified professionals.

c. Implement Directory of Certified Professionals: As specified in the WaterSense Professional Certification Program Labeling System, EPA will collect a list of certified professionals from each PCO quarterly and publish that list in consolidated directory of certified professionals. At the direction of the WACOR, the contractor shall populate the directory with data provided by PCO partners and launch the directory on the WaterSense public website. After the launch, the contractor shall update the data quarterly.

The contractor shall communicate with each PCO on quarterly basis to request the submittal of data. Once all quarterly data is submitted, the contractor shall then use the submitted data to update the directory. The contractor shall provide support to and answer questions from PCOs regarding data submittal. The contractor shall develop standard operating procedures for the collection of data from the PCO partners and the updating and publishing of data in the directory.

d. Update materials that reference irrigation partners: As directed by the WACOR, the Contractor shall update references to the irrigation partnership program in materials, including but not limited to, official guidance documents, specifications, program guidelines, web text on the partner and public websites, brochures, and other materials. For planning purposes, the Contractor shall plan to review and revise ten (10) separate documents. The Contractor shall draft changes to such documents and web text and provide changes to the WACOR for review. Upon receipt of proposed changes from the Contractor, the WACOR shall review and return proposed changes to the Contractor for incorporation. The Contractor shall make changes to applicable documents and return finalized versions to the WACOR. For updating web text, the Contractor shall submit the original web text in word document format with track changes to demonstrate the proposed changes. The Contractor shall send the word document with track changes to the WACOR.

Sub-Task 3.3: Support for Outreach on Outdoor Water Efficiency

a. Outdoor Marketing and Outreach: Addressing outdoor water use presents a substantial opportunity for water savings. Under this subtask, the Contractor shall develop three (3) – five (5) new materials and revise two (2) – four (4) existing materials to help WaterSense spread a

message of outdoor water efficiency. Developed messaging shall focus especially on WaterSense's top four (4) outdoor messages:

- (1) Use certified irrigation professionals
- (2) Design the landscape for water efficiency
- (3) Use the right amount of water in the landscape
- (4) Replace standard controllers with weather-based irrigation controllers.

Developed materials may include, but are not limited to: a campaign to encourage hiring certified professionals; materials to effectively promote WBICs; brochures on water-efficient landscaping; new content for the Smart Outdoor Practices section of the WaterSense website; adapting existing outdoor or irrigation content; messaging in the form of web banners and other items for WaterSense social media outlets to garner attention to WaterSense outdoor campaigns; and briefings, presentations, and other outdoor sector materials (e.g., graphics, briefing slides, talking points, fact sheets) for use within and outside of the Agency in consultation with EPA personnel.

For the development of new content or revision to existing content, the Contractor shall submit draft versions for EPA approval. The Contractor shall make EPA-approved revisions and provide final versions of the materials, incorporating any revisions. The Contractor shall make final versions of the materials available on the WaterSense Partner Resources website or WaterSense public website, as directed by the WACOR.

b. Partner Event to Promote Labeled Controllers: The contractor shall support the initial planning for a partner event to promote the use of labeled controllers to be held in spring 2015. The contractor shall identify options for the event, including potential partners to host and support the event, to the WACOR. The partner event may include direct outreach to consumers, training for irrigation professionals, or both. After the WACOR decides which option to pursue, the contractor shall coordinate planning the event, including but not limited to, supporting host and supporting partners communication, identifying materials needed, and identifying media and promotional opportunities.

Sub-Task 3.4: Conference Travel

For planning purposes, the Contractor shall assume one (1) four (4) -day trip will be required to support WaterSense activities related to irrigation professional certification and outdoor water efficiency outreach. The Contractor can expect to attend one Irrigation or Outdoor Conference, location and date TBD.

Based on the WaterSense's needs at the conference, the Contractor may be tasked with developing the following: technical session presentations, facilitate or attend technical sessions, and/or develop and disseminate conference specific promotional materials. Details of the extent of support will be provided by the EPA WACOR to the Contractor through written technical direction.

Following the conference, the Contractor shall prepare and submit to the EPA WACOR, a brief (two (2) – three (3) page) report summarizing relevant conference highlights. Based on the type

of support provided, the report should include such information as attendance at the WaterSense exhibit, types of questions asked by the attendees, feedback on WaterSense or WaterSense labeled products and services, names of WaterSense partners exhibiting, number of attendees and comments/questions at pertinent technical sessions, promising contacts, potential partners, and media questions/inquiries.

IV. DELIVERABLES

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. The Contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAAEE) guidelines, standards, best practices, technical requirements for web site design and publications and all deliverables shall comply with those requirements. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 calendar days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

Task	Task Title	Subtask	Deliverable	Due Date
1	Work Plan and Budget	1.1	Work Plan	Fifteen (15) calendar days after the contractor receives the work assignment.
		1.1	Monthly Progress Report	Monthly
		1.2	Conference calls with WACOR and TM	Bi-weekly or as needed
2	New Homes Partner Support			
	Sector Specific Market Research	2.1	Sector-Specific Market Research Report	Within three (3) weeks of WACOR direction
	Strategic Planning	2.2	Annual Outreach Work Plan for New Homes Partners	January 2015
	New Homes Materials & Partner Tools	2.3	New Homes Partner Toolkit Recommendations	Semiannually
		2.3 a	Draft Partner Tool/Revisions to Tools	Within three (3) weeks of WACOR direction
		2.3 a	Final Partner Tools	Within two (2) weeks of TM comments
		2.3 b	Draft Partner Support Materials	Within three (3) weeks of WACOR direction
		2.3 b	Final Partner Support Materials	Within two (2) weeks of TM/ WACOR comments
	New Homes Partner Webinars	2.4	Draft presentation	Within two (2) weeks of WACOR direction
		2.4	Final presentation	Within one (1) week of receipt of TM comments
	Recruitment & Support of Local Promotional Efforts	2.5	Develop Recruitment Rollout Plan	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 a,b	Draft Materials for call/webinar w/ interested stakeholders/partners	Within three (3) weeks of WACOR direction
		2.5 a,b	Finalize Materials for call/webinar w/ interested stakeholders/partners	Within two (2) weeks of TM comments
		2.5 b	Local Promotional efforts – strategy	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 b	Local Promotional efforts – implementation	As outlined in TM-approved strategy; to be completed by end of January 2015

		2.5 c	Affordable Housing Recruitment - strategy	Within three (3) weeks of WACOR direction; to be completed by November 2014
		2.5 c	Affordable Housing Recruitment – implementation	As outlined in TM-approved strategy; to be completed by the end of January 2015
		2.5 d	Draft materials for affordable housing recruitment	Within three (3) weeks of WACOR direction
		2.5 d	Finalize materials for affordable housing recruitment	Within two (2) weeks of TM comments
	Update New Homes Content on Public Website	2.6	Develop text for web updates/postings	Within two (2) weeks of WACOR direction
		2.6	Finalize text for web updates/postings	Within one (1) week of receipt of TM comments
Task	Task Title	Subtask	Deliverable	Due Date
3	Outdoor			
3	Strategic Planning	3.1	Draft strategic plan for the outdoor sector	Within three (3) weeks of communication from WACOR
		3.1	Final strategic plan for the outdoor sector	Within two (2) weeks of receipt of comments from WACOR
3	Professional Certification Labeling Program	3.2 a	Protocols for review of applications	Within two (2) weeks of direction from WACOR
		3.2 a	Summary report on application	Within three (3) weeks of receipt of application from potential PCO
		3.2 a	Follow-up with applicant	Within one (1) week of decision by WACOR
		3.2 b	Schedule call with newly labeled PCO	Within two (2) weeks of program labeling
		3.2 b	Send welcome materials to newly labeled PCO	Within one (1) week of program labeling
		3.2 c	Launch of directory of certified professionals	Within three (3) weeks of communication from WACOR
		3.2 c	Collect data and update directory	Quarterly
		3.2 c	Standard operating procedures for the directory	Within three (3) weeks of the launch of the directory
		3.2 d	Draft updates to materials that reference irrigation partners	Within two (2) weeks of communication from WACOR

		3.2 d	Final updates to materials that reference irrigation partners	Within two (2) weeks of receipt of comments from WACOR
3	Outreach on Outdoor Water Efficiency	3.3 a	Draft outdoor marketing and outreach materials	Within three (3) weeks of communication from WACOR
		3.3 a	Final outdoor marketing and outreach materials	Within two (2) weeks of receipt of comments from WACOR
		3.3 b	Summary of potential event and event hosts	Within three (3) week of communication with WACOR
3	Conference Travel	3.4	Attend conference	TBD
			Conference report	Within two (2) weeks of end of conference

V. MISCELLANEOUS

A. Software Applications and Accessibility:

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume one (1) to two (2), three (3) – four (4) day trips will be required over the course of this Work Assignment. Any specific travel proposed for completion of this work assignment must be approved in writing by the EPA contract level COR in advance.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VI. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-03				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense New Homes and Outdo				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance From 08/14/2014 To 02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations date use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee: \$0.00		LOE: 0						
07/18/2014 To 02/13/2015										
This Action:		\$167,164.00		2,030						
Total:		\$167,164.00		2,030						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated: 08/29/2014		Cost/Fee: \$167,164.00		LOE: 2,030						
Cumulative Approved:		Cost/Fee: \$167,164.00		LOE: 2,030						
Work Assignment Manager Name Karen Flogger <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number 202-564-2992 FAX Number:				
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name Kathleen Rechenberg <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:				
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:				

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-03				
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001				
Contract Number EP-C-14-014			Contract Period 07/17/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance From 08/14/2014 To 02/13/2015				
Comments: The purpose of this amendment is to change the Alt. WACOR to Amber Lefstead.										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:			LOE:					
07/17/2014 To 02/13/2015										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name Amber Lefstead <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number 202-564-2906 FAX Number:			
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name Veronica Blette <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-4094 FAX Number:			
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:			

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-04				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense Web support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3					
Purpose: <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Work Plan Approval </div> <div> <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Incremental Funding </div> </div>						Period of Performance From 08/14/2014 To 02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:						820				
Total:						820				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name Jonah Schein <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between;"> <div>(Signature)</div> <div>(Date)</div> </div>							Branch/Mail Code: Phone Number 202-564-2720 FAX Number:			
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between;"> <div>(Signature)</div> <div>(Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name Kathleen Rechenberg <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between;"> <div>(Signature)</div> <div>(Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:			
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between;"> <div>(Signature)</div> <div>(Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:			

PERFORMANCE WORK STATEMENT
Technical Evaluation and Market Assessment Support for the Water Efficiency Program
Contract No. EP-C-14-014
Work Assignment No. B-04

I. ADMINISTRATIVE (PWS Area 3.2.4)

A. Title: WaterSense® Program General Web Support and Maintenance

B. Work Assignment Contracting Officer Representative:

Jonah Schein
US EPA (MC: 4204M)
1200 Pennsylvania Ave., N.W.
Washington, DC 20460
(202) 564-8836, FAX: (202) 501-2396

Alternate Work Assignment Contracting Officer Representative:

Karen Wirth
US EPA (MC: 4204M)
1200 Pennsylvania Ave., N.W.
Washington, DC 20460
(202) 564-5246, FAX: (202) 501-2396

C. Quality Assurance:

The requirements of this work assignment do not include the collection of primary or secondary environmental data; therefore, a programmatic quality assurance project plan (PQAPP) is not required.

Background: WaterSense, an EPA partnership program, seeks to enhance the market for water-efficient products and practices. The program aims to provide information to residential and commercial/institutional consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

II. OBJECTIVE:

The objective of this work assignment is to provide support for website evaluation and ongoing maintenance updates for the WaterSense program. This work assignment applies to all websites maintained by WaterSense (currently these consist of the public

website and the password protected partner website). EPA seeks to continually improve the user experience and to more effectively communicate the WaterSense message through its program website. For each of the following tasks, EPA will make results of previous research and program development materials available to the Contractor as necessary. For all tasks, The Contractor shall provide all source files and content to EPA with final deliverables. In order for the Contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis, etc from other WAs under this contract; however, no work will be duplicated on any two WAs. The Contractor shall maintain comprehensive knowledge of EPA's Office of External Affairs and Environmental Education (OEAE) and Office of Environmental Information (OEI) guidelines, standards, best practices, and technical requirements for website design and publications as well as OEAE partnership program requirements. All deliverables shall comply with those requirements.

III. TASK DETAIL:

The Contractor shall perform the following tasks:

Task 0 - Work Plan and Budget Development

The Contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996).

Task 1 Maintain Accuracy and Timeliness of the WaterSense Website. The WaterSense website will continue to be "the place to go" on EPA's website for information about water efficiency. The site shall include up to date information on the need for water efficiency and the related benefits, both environmental and economic as well as programmatic information related to campaigns, specifications, and program implementation. It will provide free, unbiased information and technical support on water efficiency. The Contractor shall provide support to EPA staff to ensure the timely updating of the WaterSense website.

Task 1.1 Website Maintenance: Maintaining the WaterSense website will require ongoing (daily) monitoring; frequent (weekly) changes, and updating of documents. The contractor shall perform maintenance at the intervals defined in Task 2 in order to ensure proper functioning of the site. Maintenance will include weekly review of the site's content for accuracy, scans for broken links, and other methods as determined in conjunction with the EPA WACOR.

Task 1.2 Ensure the Accuracy of Site Content: The Contractor shall ensure the accuracy of all data included on the WaterSense website on web pages as well as in PDFs and other posted files, by clearing the content with EPA WACOR prior to development. The Contractor shall also ensure, both on web pages and in posted files, the accuracy of all WaterSense program marks and the coherence of all website messaging vis-à-vis WaterSense guidance documents such as the Program Guidelines, Graphics Standards and Style Guide, and Label and Logo Use Guidelines.

Task 1.3 Maintain Site: The Contractor shall ensure that the site services current program needs, by effectively communicating information about the program to partners and to the public. Maintaining the WaterSense website will require frequent changes to existing pages, documents (such as PDFs), and sections as well as their creation. Web planning and development shall be done with anticipation that the list of 'likely visitors' will grow as the program grows. Strategies to accommodate the growth of the program should be presented to WACOR.

Task 1.4 Provide Ongoing Technical Recommendations: The Contractor shall make unsolicited recommendations aimed at improving the ease with which users access, navigate, and learn from the WaterSense website. The Contractor shall also make recommendations as to how best maintain the WaterSense website given anticipated changes to EPA web policy or hosting environment. Recommendations should not be implemented without approval from the EPA WACOR.

Task 2 Follow Website Update Protocol. Due to the frequent nature of programmatic developments and additional content needed to be posted to the WaterSense Web site, updates shall be scheduled by EPA at periodic intervals. Such updates can apply to any of the web sites maintained by WaterSense. For planning purposes, the Contractor shall anticipate two (2) updates each month. The Contractor will be notified of needed changes no later than five (5) days prior to the live posting date.

Task 2.1 The Contractor Shall Maintain a List of Items and Files Required: Review list (provided to the Contractor by EPA WACOR in excel format via email prior to the scheduled update) of necessary files, text, and web pages required for regular site updates. This information will be provided approximately five (5) days before the scheduled update. It will be the responsibility of the Contractor to alert EPA WACOR at least four (4) days prior to the scheduled update regarding missing elements (files, links, or pages) critical to the functioning of the website.

Task 2.2 The Contractor Shall Perform Regular Updates: As a partnership program, WaterSense requires that certain items receive regularly scheduled updates. Updates will consist of the edits and changes contained in the update list provided to the Contractor in task 2.1. More in depth updates will also occur on

periodic basis. In the event of larger updates, EPA WACOR will work in conjunction with the Contractor to ensure that adequate notice is given. For planning purposes, The Contractor shall assume 4-8 new pages will need to be either posted, updated or removed from the site completely during each update.

Task 2.3 The Contractor Shall Adhere to Update Review Process: The Update Review Process shall consist of three steps, and EPA WACOR may request edits to the update at any time. In Step 1, the EPA WACOR will provide to the Contractor, a list in excel format via email of anticipated updates five (5) days prior to the scheduled update and The Contractor shall maintain list of items and files. Step 2, upon receipt of the list in Task 2.1, the Contractor shall post the proposed update materials in EPA's test environment. Step 3, after the materials in the test environment have been approved by EPA WACOR, The Contractor shall post the materials for public access on the EPA server. In the event that the EPA server environment should change (for instance the launch of a content management system replacing EPA's current UNIX servers), then the comparable password protected environment and public environments will take the place of the test and public directories respectively.

Task 2.4 The Contractor Shall Perform Additional Updates as Needed: From time to time, EPA will require updates to be rescheduled, added, or eliminated based on pressing and time sensitive program developments. Such incidents will occur at the discretion of the EPA WACOR. In such cases, EPA WACOR will alert the Contractor to these needs no later than one business day prior to the update. Contractor should expect such updates to occur two (2) times per quarter.

TASK 3: Configure and Produce Code to Connect the WaterSense Website with the WaterSense CRM Data. The Contractor shall configure and maintain the WaterSense Customer Relationship Management software (SalesForce) to directly feed the WaterSense website information regarding WaterSense labeled products, partners, and additional information stored in SalesForce. SalesForce data (and other sources as deemed necessary by the EPA WACOR) shall continue to be maintained such that its contents can be dynamically queried by the WaterSense website and accessed utilizing AJAX and JavaScript techniques, allowing for the creation of dynamic and searchable pages without the need for flash plug-ins or maintenance of additional databases. The Contractor shall configure additional information entered into SalesForce such that it is also accessible in this manner as additional product and partner categories are added to the program. Information shall be accessible on the WaterSense website regardless of hosting environment.

Task 3.1: The Contractor shall configure SalesForce output: The Contractor shall be responsible for maintaining the SalesForce output (and output for additional sources) configuration and ensuring the appropriate data is accessible on the WaterSense website. The available data fields will be governed by information currently stored in SalesForce and/or the source data.

Task 3.2: The Contractor shall configure Salesforce output to support additional functionality: The Contractor shall be responsible both for incorporating new product data into the Salesforce output and ensuring the appropriate data is accessible on the WaterSense website as well as adding fields required to support greater search functionality. For planning purposes, Contractor should assume 1 new product categories per year, and one additional feature or other change per quarter. The Contractor shall have information on new product categories prepared 20 days after receipt of the first labeled products in said category.

Task 3.3: Develop and record standard operating procedures for managing Salesforce Output and making it available on the website: The Contractor shall produce standard operating procedures for this process. These procedures will serve as a reference for recreating a comparable level of accessibility and functionality should changes occur on either side of the flow of information (i.e. should changes occur in the CRM or should they occur on EPA's website and technical stack).

Task 4 Provide Web Statistics and Analytics. The Contractor shall provide relevant information to EPA regarding the traffic and use of resources on the WaterSense website. In order to gain reliable feedback on the performance of the website, EPA requires regular data on website usage. The Contractor shall provide EPA with monthly statistics regarding website traffic, resources accessed, and other activity on a monthly basis. Monthly reports do not need to include a written analysis or recommendations. Reports should be conveyed using the standard WebTrends format. If needed, and only after approval from the EPA WACOR, the Contractor can change from WebTrends to an alternate application (such as Quick Tracks) if such a change would provide additional efficiency or information.

Task 4.1: Prepare a report summarizing web statistics on the WaterSense website since its inception: The Contractor shall produce a report summarizing the statistics and analytics on the WaterSense website since it first went online. EPA will make available to the contractor all necessary data points and log files for this purpose. The report shall focus on common themes in frequently accessed resources, degrees of responsiveness (in terms of traffic) to other internal and external factors, and recommendations for best management practices moving forward.

Task 5 Comply with and Monitor EPA Web Requirements. The WaterSense website needs to conform to all applicable EPA standards, requirements, and policies.

Task 5.1 Comply with EPA Web Guide: The Contractor shall maintain compliance of the WaterSense website with regard to the EPA Web Guide and inform EPA staff of important aspects of the Guide as they are encountered in the course of web maintenance and development as soon as they are encountered. The Contractor shall also inform EPA when notable changes occur in the Guide

when web postings are likely to be affected by said changes a minimum of ten (10) business days before the affected posting.

Task 5.2 Ensure Security Standards on EPA Servers: The Contractor shall conform to all security measures related to directly accessing EPA's Web servers as defined by EPA's web guide. Doing so includes promptly resetting server access (TSSMS) passwords prior to their expiration every ninety (90) days. In addition, The Contractor shall take steps to ensure that, in the event of circumstances beyond the Contractor's control, such as power outages or natural disasters, back-up systems are available to safeguard the Contractor's ability to access EPA servers. The Contractor shall provide these steps to EPA WACOR. In the event of back-up system failure, The Contractor shall be prepared to work, under technical direction provided by the WACOR, with IT staff at EPA to maintain the accessibility of the program website.

Task 5.3 Monitor Developments in EPA Web Policy: The Contractor shall monitor, with the assistance of EPA staff, the progress of any and all initiatives within the Office of Water, Office of Environmental Information and the Office of External Affairs and Environmental Education as well as other offices aimed at making changes to the technical requirements related to the maintenance of an EPA website. Such requirements may include but are not limited to content management systems (CMS), cascading style sheets (CSS), and special guidelines developed for use by partnership programs only. Accordingly, the Contractor shall take all such initiatives into account when maintaining the existing website or making plans for future development. The Contractor shall notify the WACOR in writing of any such changes likely to impact the WaterSense site within fifteen (15) business days.

Task 6 Work Assignment Management.

The Contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone as needed. For planning purposes Contractor should assume that such meeting will consume approximately two (2) hours per month. The Contractor shall provide a status update for tasks via email two days before each meeting. The Contractor shall meet with the WACOR on specific issues related to proper functioning of the site and the servicing of the audiences' needs more frequently as directed by the WACOR. Contractor should plan on one such meeting per quarter.

IV. DELIVERABLE SCHEDULE:

Task	Subtask	Deliverable	Due Date
0		Work plan	15 calendar days after the Contractor receives the work assignment.
1	1.1	Website Maintenance	Ongoing

	1.2	Ensure the Accuracy of Site Content	Ongoing
	1.3	Maintain and Expand Site	Ongoing
	1.4	Ongoing Technical Recommendations	Ongoing
2	2.1	Maintain List of Items and Files Required	Immediately upon receipt of update list
	2.2	Perform Regular Website Updates	5 days after receipt of update list
	2.3	Adhere to Update Review Process	5 days after receipt of update list
	2.4	Perform Additional Updates as Needed	1 day after receipt of comments from WACOR
3	3.1	Connect WaterSense CRM to Public Site	Ongoing
	3.3	Develop SOP for Salesforce Output	End of period of performance
4		Provide Monthly Website Statistics	Within 10 days of the end of the month
	4.1	Provide a report summarizing website activity	End of period of performance
5	5.1	Comply with EPA Web Guide	Ongoing
	5.2	Ensure Security Standards on EPA Servers	Ongoing
	5.3	Monitor Developments in EPA Web Policy	Ongoing
6		Work Assignment Management	Bi-monthly

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

V. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 8.0

B. Travel.

Travel will not be required in completion of this work assignment.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-04				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense Program General Web				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance From 08/14/2014 To 02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee: \$0.00				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:		\$69,688.00				820				
Total:		\$69,689.00				820				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated: 08/29/2014		Cost/Fee: \$69,688.00				LOE: 820				
Cumulative Approved:		Cost/Fee: \$69,689.00				LOE: 820				
Work Assignment Manager Name Jonah Schein <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number 202-564-2720 FAX Number:				
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name Kathleen Rechenberg <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:				
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:				

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-05				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Work Plan Approval </div> <div> <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Incremental Funding </div> </div>						Period of Performance From 08/12/2014 To 02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:						6,720				
Total:						6,720				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:		LOE:				
Cumulative Approved:				Cost/Fee:		LOE:				
Work Assignment Manager Name Stephanie Tanner <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number 202-564-2660 FAX Number:				
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name Kathleen Rechenberg <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:				
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:				

PERFORMANCE WORK STATEMENT

Contract # EP-C-14-014

Work Assignment No. B-05

I. ADMINISTRATIVE

A. Title: WaterSense® Product Development and Technical Support

B. Period of Performance: Issuance -2/13/15

C. Work Assignment Contracting Officer Representative

Work Assignment COR. Stephanie Tanner 1200 Pennsylvania Ave, NW MC 4204-M Washington, DC 20460 202-564-2660 Phone 202-501-2396 Fax	Alternate WACORWACOR Jonah Schein 1200 Pennsylvania Ave, NW MC 4204-M Washington, DC 20460 202-564-2720 Phone 202-501-2396 Fax
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D. Quality Assurance

The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor shall create one PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

E. Background

The WaterSense program is a voluntary partnership program to enhance the market for water-efficient products and practices. The program seeks to provide information to residential and commercial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

F. The level of effort estimated for this work assignment is 6720 hours.

II. OBJECTIVE

The objective of this work assignment is to obtain technical support in the evaluation of water-using products, systems, services and activities for their potential inclusion in the WaterSense program. EPA requires an in-depth understanding of both the technology, system or service and the market place in order to make decisions about market enhancement. This work assignment will provide research on products and services, development of specifications, conformity assessment and assistance with technical outreach to stakeholders.

For each of the following tasks EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the contractor shall be responsible for coordinating certain activities with other EPA offices or other organizations outside of the EPA. In any communication with other EPA offices or organizations outside of EPA, the contractor must be certain to communicate that they are working as a contractor to the EPA's Office of Water (see section V. E). The contractor must be familiar with EPA's Office of Public Affairs guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables should comply with those requirements.

III. TASK DETAILS

The contractor shall perform the following tasks:

Task 1 - Work Plan, Program Planning, Funds Tracking and Management

Task 1.1 Work Plan – The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables.

Task 1.2 Funds Tracking and Management – This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996). The budget for this work assignment shall be tracked at the task level. The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment planning issues. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for a maximum of twelve (12) times. The contractor shall also maintain a milestone chart or other tracking system for projects underway as part of this WA.

Task 1.3 Program Planning – The contractor shall assist the WaterSense program in developing a five (5) year plan for the technical program. The task will include organizing meetings with 10-15 stakeholders to obtain feedback on program successes and future direction. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a plan that may include a framework for screening projects, goals for products, systems and services and other activities to be undertaken by the program. The technical plan should complement the overall program plan, goals and objectives.

Task 2 – Product Screening and Research

Under this task the contractor shall conduct research on products and services for inclusion in the WaterSense program. This research will be the basis for determining if development of a specification is necessary under Task 3. Under this task area the contractor shall complete the preliminary screenings and detailed assessments described below. For each product or service, a draft and final report shall be completed.

Task 2.1 Product Screening and Pipeline Management – The contractor shall update and maintain the WaterSense product screening tool. The product screening tool is a spreadsheet used by the WaterSense program to prioritize products for detailed research and possible specification development. The contractor shall collect information on new water efficient products for consideration by the WaterSense program. New products can be identified from a number of sources including, but not limited to, conferences, trade shows, helpline inquiries, and technology magazines. On an annual basis the contractor shall update the tools to ensure that product information is current. The screening shall look at the overall technical and market situation of products and be based on easily available information including, water use, water saving, payback periods, national sales figures, status of standards and testing protocols. The contractor shall meet with the WACOR to review the revised tool and discussion new program priorities. This meeting should be held within one (1) month of the tool revision. The contractor shall expect to update the screening tool once as part of this work assignment. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms.

Task 2.2 Technical Assessments and Market Research Report – The contractor shall complete research that provides a broad understanding of identified product categories and specific products. This information should build on information gathered during the preliminary screening. Information developed at this level should inform the specification development and conformance assessment process. This assessment shall be used to determine which products will actually be included in the WaterSense program and what the appropriate market mechanism will be. This phase of the research should conclude with a research report for the program. The research should cover the topics outlined in the WaterSense Specification Development Guidelines (Guidelines).¹

The contractor shall complete one (1) draft report and one (1) final report as part of this work assignment. The contractor shall attend and participate in 4-5 meetings taking place locally or via conference call or webinar. The EPA WACOR will give the contractor at least a two (2) week notice of expected meeting dates and times.

¹ ERG is already in possession of the Specification Development Guidelines

Task 3 - Product Development and Management

The EPA has selected a number of products for further development based on work completed under Contract EP-C-09-008. The contractor shall work with EPA to engage a broad spectrum of stakeholders including: (non-government organizations) NGOs, trade and professional associations, products manufactures, service providers, conformance assessment bodies, standard setting bodies and utilities. Input from stakeholders can be obtained from a range of mechanisms from simple conference calls to formal meetings, as appropriate. The contractor shall have a system in place for tracking and managing input from stakeholders and the general public. This process is highly dependent on the industry and complexity of the technology, but should follow the instructions outlined in the Guidelines. Detailed information on the development of the documents in this section is included in the Guidelines. The contractor should also develop tracking material for each task as necessary. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend 1-2 meetings of 1-2 days each as part of this task. The WACOR will provide at least a two (2) weeks notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms.

Task 3.1 Notice of Intent (NOI)– This is the process by which WaterSense formally declares its intent with respect to products. Where an NOI was issued under a prior work assignment, the contractor shall continue the NOI process for this product. The main objective of this process is to engage the stakeholder community and obtain information needed to fully develop a specification or other WaterSense output document. The contractor can expect to work on two (2) NOI as part of this WA. It is also possible that one (1) of these products may not be completed due to technical issues; in that event the WACOR will inform the contractor on a replacement product or task consistent with this WA.

Task 3.2 Draft Specifications – Once WaterSense has answered the outstanding questions in the NOI, the specification development process can begin. When directed by the WACOR, the contractor shall develop the draft specification in accordance with the Guidelines and based on information developed during the research and NOI phases. This process shall require the contractor to coordinate up to three (3) public meetings of 2-3 hours, as appropriate to handle comments from the stakeholder community. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. In addition the contractor shall prepare the

Supporting Statement which summarizes the intent of the specification, research and cost effectiveness of the proposed specification and other documents as described in the Guidelines. The contractor can expect to complete up to three (3) Draft Specifications for products as part of this work assignment.

- a. *Flushometer valve toilets* – Under EP-C-09-008 WA4-05 and 5-05, the contractor began developing a draft specification for Flushometer valve toilets. The contractor shall complete development of the draft materials, host the public meeting for this product, collect and summarize written comments and those received from the public meeting and continue to work with the ASME² and other relevant organizations to finalize the test method and specification for this product.
- b. *Irrigation Devices* – At the direction of the WACOR the contractor shall begin developing a draft specification for outdoor irrigation devices where sufficient information was gathered under task 3.1 above. The contractor shall work with any relevant industry or standard development organization as directed on these products. The contractor can expect to complete 1-2 draft specifications under this work assignment.

Task 3.3 Final Specifications – At the conclusion of the draft specification comment period the contractor shall begin development of a final specification. The contractor shall develop the final specification in accordance with the Guidelines and based on additional information gathered or any further research identified during the comment period. This process shall generally include review and adjudication of all comments received, development of a plan for and conducting any further research needed to complete the specification. The contractor can expect to complete up to one (1) Final Specification for products as part of this work assignment.

Task 3.4 Technology Assessment Guide – If WaterSense determines that a specification is not appropriate for a product, then the contractor shall develop a Technology Assessment Guide for use by Water efficiency practitioner. The Guide shall be a useful summary of the research obtained and provide information to building managers and utilities on appropriate uses of the technology, installation guidance as appropriate and cost effectiveness information. The contractor can expect to complete one (1) Technology Assessment guide as part of this work assignment.

Task 3.5 Specification Updates – Due to technological changes in existing standards and other market factors some minor adjustment to the language of a number of existing specifications needs to be made. The contractor shall work with manufacturers, utilities and other stakeholders to update the existing specifications as determined by the WACOR. Where appropriate the contractor

² A voluntary consensus based plumbing standards committee composed of manufacturers, utilities, NGO and local governments. We participate in accordance with the NTTAA and OMB circular A-119. They set standards for all plumbing products sold in the U.S. ASME (formerly American Society of Mechanical Engineers) no longer uses the longer title and now goes by its acronym.

shall also work with the ASME standards committees and DOE on adjustments to the language. The contractor can expect to update the specifications listed for showerheads and possibly 2-3 others, which may require up to two (2) meetings each via webinar.

Task 3.6 Standards Development Committee Participation – The contractor shall continue to participate standards committees relevant to WaterSense specification or activities. In this capacity, the contractor shall work with the committee to develop a schedule for developing specifications, coordinate with committee members, analyze data relevant to WaterSense, and review materials developed by the committee. Standards Committee may include:

- ASME/CSA (Canadian Standards Association) Joint Harmonization Task Group or other committees for plumbing fixtures and fittings as needed by specification development and management tasks.
- Member of the ASABE committee on landscape irrigation emission devices and committee on smart irrigation controllers

As part of this work assignment it is expected that the contractor will participate in product standard setting committees for up to three (3) products. The contractor shall participate in 3-5 total meetings in person or via conference call or webinar. The EPA WACOR will give the contractor at least a 2 week notice of expected meeting dates and times. Many of these meetings can be combined with meetings identified in other sub tasks at the direction of the WACOR.

Task 4 - Product Certification

In order to ensure that products and services bearing the WaterSense label meet the specification criteria, WaterSense requires third party certification of products. To support this process WaterSense has developed and published the WaterSense Product Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

Task 4.1 Certification Scheme Management– The contractor shall maintain and revise as necessary the controlling documents for the Certification Scheme including, licensing agreements, ad hoc guidance to accreditation organizations and certification bodies, Product Notification Templates and the website. The contractor can expect to maintain up to twenty (20) certification documents as part of this work assignment.

Task 4.2 Certification Audit – The contractor shall continue the audit of the certifications system begun under EP-C-09-008 WA 5-05, by developing a report summarizing the finding of that audit. The contractor shall then develop a plan for further auditing the certification program based on the findings in the first audit report. This audit will include up to six (6) Licensed Certification Bodies (LCB) and 2-3 products categories. The contractor shall work with the selected LCBs,

collected and review the necessary information and prepare a report summarizing the findings. The contractor shall make recommendation for changes to procedures or additional training necessary to correct any deficiencies found in the audit.

Task 5 - Technical Product Support

The objective of this task is to support products launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense program as they develop. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend 1-2 meetings of 1-2 days each as part of this task. The WACOR will provide at least a two week notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. Possible areas of support include:

Task 5.1 Green buildings – EPA is working with a number of organizations to include water efficiency in the requirements for high-performing new and existing buildings. The contractor shall provide support such as reviewing other green building standards and codes as needed to this effort. The contractor can expect up to five (5) requests for support throughout the year.

Task 5.2 Marketing and technical outreach – the contractor's technical team staff will coordinate with marketing team staff to ensure that outreach material and activities correctly reflect the technical aspects of the program. This can include media information requests, web content, presentations and conference papers. The contractor may also be required to attend conferences, tradeshow or other meetings to educate stakeholders on WaterSense. The contractor can expect up to five (5) requests for support throughout the year.

Task 5.3 Miscellaneous technical support – From time to time questions from stakeholders arise about WaterSense products, other water efficiency products and services and other technical issues. The contractor can expect up to ten (10) requests for support to answer questions throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required.

Task 5.4 Energy Star Program Coordination – The contractor shall work as needed with Energy Star to develop water criteria for energy and water using products. Activities may include, attending stakeholder workshops, review of products reports and proposed criteria and developing recommendations for new water efficiency criteria. The contractor can expect 2-4 requests for support throughout the year. It is expected that attending the workshops will not require any non-local travel on the part of the contractor.

Task 5.5 Life-cycle Analysis – The contractor shall perform life-cycle analyses on potential WaterSense products. The analysis shall conform to either ISO 14040 series and/or ASTM D7075 standards, as appropriate. The contractor can expect up to two (2) requests for support throughout the period of performance of this work assignment.

Task 5.6 Metrics and Modeling – The contractor shall continue to maintain and update the factoid catalog developed under EP-C-09-008 WA 4-05. Support for this task shall include addition of new facts as directed by the WACOR and revision of the data set with new price or water metric data if available. The contractor may expect development of 5-6 new facts for the catalog during the performance period.

Task 6 – New Homes Specification and Certification System Management

For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

The objective of this task is to support the New Homes Program launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense New Homes program as it develops. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. Possible areas of support include:

Task 6.1 New Homes Specification Management – From time to time questions from stakeholders arise about WaterSense specifications, other water efficiency products and services and other technical issues. Occasionally, these will result in the need for modifications or clarifications to the New Homes Specification documents. The contractor can expect up to twenty (20) requests for support to answer questions and 1-2 modifications/clarifications to the specification documents throughout the work assignment period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required. The contractor will also compile a summary of these activities prior to the end of the work assignment period of performance.

Task 6.2 New Homes Certification System – To ensure that new homes bearing the WaterSense label meet the specification criteria; WaterSense requires third party certification of homes. To support this process WaterSense has developed and published the WaterSense New Homes Certification System. The system

provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

- a. Certification System Document – The contractor shall maintain and revise as necessary the controlling documents for the Certification system including, licensing agreements, ad hoc guidance to administrators, Certification providers and auditors. The contractor can expect to maintain up to twenty-five (25) certification documents as part of this work assignment.
- b. Periodic Reports – The contractor shall review and analyze Certification Provider Quarterly reporters and Builder annual reports for use by EPA in managing the system and informing future decisions. Based on information in the reports and guidance from the WACOR the contractor shall prepare a recommendation for any changes to the Certification system needed to improve management of the program. The contractor shall also prepare a summary of issues identified by the helpline or other stakeholders to provide to Program administrators as part of their assessment process.
- c. Training – The contractor shall provide training as necessary to Certification Program Administrators and providers on the new homes certification systems. They shall use the presentations and other materials developed under the Work Assignment 3-05, 4-05, and 5-05 of EP-C-09-008.

Task 6.3 New Home Builder Resource Manual & Training Materials– The contractor shall maintain the timeliness and accuracy of the Builder Resource Manual completed under WA 1-02, EP-C-09-008 as well as supplemental training materials.

- a. Builder Resource Manual – The manual shall be updated to reflect any changes made to the New Homes specification under task 6.2 or 6.3. The contractor shall receive technical direction from the WACOR when changes are deemed substantial enough to warrant updating the resource manual and the contractor and WACOR shall agree on appropriate response time in these instances.
- c. Training Materials – The contractor shall prepare additional technical training materials to support the adoption of WaterSense Labeled Homes and water-efficient building practices throughout the residential construction industry. The contractor shall receive technical direction from the WACOR when such materials become necessary. The contractor shall also identify opportunities to educate builders and associated trade professionals at existing forums and venues where the target audience is known to attend. The contractor and WACOR will agree

on appropriate venues as well as appropriate deadline for the related material.

Task 7 – Commercial and Institutional Sector Outreach

The WaterSense Program will provide information and guidance to the CI sector on water efficiency and management. For this task, the Task Manager is Tara O'Hare, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. In order to support this, the Contractor shall complete the following tasks:

Task 7.1 General CI Materials – The Contractor shall revise and modify existing materials on water efficiency in the CI sector for use in association with the WaterSense program. Specifically the contractor shall continue to implement the WaterSense H2Otel Challenge that was developed and launched under WA 4-05 and 5-05. The H2Otel Challenge will be the main CI outreach priority during the period of performance including the wrap up of 2014 activities and the continuation of a Challenge in 2015 (may include additional facility types beyond hotels). All existing materials will be provided by the WACOR. The Contractor shall also develop new materials to assist specific stakeholders such as building owners, architect and engineering firms, and facility managers implement water efficiency in hospitality facilities and other CI buildings. This shall include the revision and creation of approximately 10-15 materials such as factsheets, frequently asked questions, case studies, talking points, web content, presentation slides, key messages, e-mails to partners, program announcements, and press releases among other pieces during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded for placement on the WaterSense website. The Contractor shall use the materials developed in this task to assist the WaterSense program in conducting outreach to CI buildings via emails, trade articles, webinars, or press releases. In addition, the Contractor shall assist EPA in incorporating WaterSense information into materials for ENERGY STAR Commercial and Institutional building partners. For purposes of estimation, 20-25 outreach activities are expected during this period of performance.

Task 7.2 CI Tools and Information Collection – The Contractor shall provide support to the WaterSense team in collecting tools and information from established CI programs and other relevant stakeholders across the country. The support shall be limited to compiling the information submitted to the WaterSense Program and compiled under the previous WAs 0-08, 1-08, and WA

2-05 through 5-05 into a useable format to be placed on the WaterSense website. Most of the information used in this effort has already been received, so minimal research will be required. The Contractor shall suggest an appropriate format in an outline or web page schematic based on the information received. Once the formatting is approved, the Contractor shall create the web pages. The web pages will be posted under the Web Support WA B-04, not this one. A written summary report will not be required for this task.

Task 7.3 Commercial Water Assessment and Evaluation Tool – The Contractor began developing an excel-based tool under WA 4-05 and 5-05 to assist facility managers, owners and other stakeholders in tracking their water use and calculating their potential savings and payback. The first version released under WA 5-05 was specifically focused on hotel and hospitality facilities. Under this WA, the contractor shall assist EPA in expanding this tool to apply to the broader CI facility audience and complete any revisions or updates to this tool including testing and finalizing the content by the end of the period of performance.

Task 8 – Commercial and Institutional Technical Support

The WaterSense Program will provide technical support to the CI sector on water efficiency and management. For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. The Contractor shall support this portion of the program by completing the following tasks:

Task 8.1 Product Deployment Strategy and Implementation – WaterSense develops strategies and methods to deploy each of its labeled product categories. To help ensure the successful launch of WaterSense's commercial products, the Contractor shall develop a short strategy to most effectively deploy CI products. For purposes of estimation, the contractor shall expect to develop 2-3 strategies of approximately five (5) pages. The strategy shall include target decision-makers and audiences in the commercial product procurement chain, The Energy Star programs CI efforts and relevant trade publications, and other market factors that would affect the launch of these WaterSense labeled products. After the approval of the strategy, the contractor shall implement the strategy as directed by the WACOR. In addition, the contractor shall continue to implement the deployment strategy for flushing urinals that was developed and approved under the previous WAs 0-08, 1-08, 2-05 and 3-05.

Task 8.2 Program Materials – The Contractor shall develop program materials specific to water efficiency and commercial products similar in format to materials created for the launch of WaterSense labeled toilets and faucets under EP-C-09-008. Much of the content for these materials has already been developed in other WaterSense materials and the product market research reports. Materials are expected to include factsheets, frequently asked questions, talking points, presentation slides, key messages, emails to partners, program announcements, and press releases among other pieces. Approximately 10-15 pieces are estimated to be developed during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded for placement on the WaterSense website.

Task 8.3 ENERGY STAR Portfolio Manager Revisions – The ENERGY STAR program is currently revising, expanding, and enhancing their Portfolio Manager tool used by all types of buildings. The Contractor shall continue to assist the WaterSense team in recommending changes and additions to the Portfolio Manager specific to WaterSense and water efficiency in CI buildings. As directed by the WACOR, the Contractor shall develop a list of recommended changes to be submitted to ENERGY STAR. The Contractor shall also provide technical support to the WaterSense team as the changes are implemented by answering questions and providing clarifications when needed within one (1) week of receipt from WACOR.

Task 8.4 Development of a Water Efficiency Benchmark Pilot Program –The objective of this task is to evaluate the feasibility of developing a water efficiency benchmark for water efficiency in multi-family, commercial and institutional buildings. The benchmark would be compatible with the Energy Star energy efficiency benchmark and based on data from its Portfolio Manager program. The evaluation would consider whether data being collected from the Energy Information Administration, Fannie Mae or other sources would be useful, from the 2007 Commercial Buildings Energy Consumption Survey provided under EP-C-09-008 WA 3-05 or the Fannie Mae survey of Multifamily buildings provided under WA 5-05.

Task 8.5 CI Best Management Practice Webinars – The contractor shall develop additional webinars in a series based on the content developed in the *WaterSense at Work: Best Management Practices for Commercial and Institutional Facilities* created under contract EP-C-09-008 WA 5-05. The contractor shall create and outline, draft presentation, and final presentation for each webinar that will include content for a specific section of the BMPs and a case study from a facility that has completed water efficiency projects in those sections. Each webinar will be approximately 1.5-2 hours in length. The contractor shall complete all logistics for the webinar including registration, presentation development, and delivery, recording and editing. The final deliverables shall be a 508-compliant, multi-media file in a format determined by the WACOR that can be placed on the WaterSense public website for

stakeholders to listen to in the future. The development of approximately 7-9 webinars will be required during the work assignment period of performance.

IV. DELIVERABLE SCHEDULE (by tasks/subtask and due date)

The deliverables for this task are highly dependent on the progress and coordination of work with outside stakeholders. All activities shall begin based on WACOR direction unless otherwise noted. Due dates for draft documents are identified in the tables below. The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

Task 1 – Work Plan, Funds Tracking and Work Assignment Management³

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
1.1	Work Plan and PQAPP	15 calendar days after the contractor receives the work assignment.
1.2	Funds Tracking and WA Management	Monthly
1.3	Program Planning	Meetings within one (1) week of WACOR direction Final plan December 15, 2014

Task 2 - Product and Service Research

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
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³ This WA contains number of activities based on our research and work with other committees. Since we have little to no control over the committee schedules deadlines are set based on information at the time and realistic. This flexibility has worked extremely well for both the contractor and the WACOR under EP-C-09-008.

2.1	Product Screening Tool	Within 20 business days of WACOR direction
2.2	Technical Assessment and Market Research	Within 60 business days of WACOR direction

Task 3 - Product Development and Management

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
3.1	Notice of Intent	Within 30 business days of WACOR direction
3.2	Draft Specification material	Within 60 business days of WACOR direction
3.3	Final Specification material	Within 60 business days of WACOR direction
3.4	Technology Guide	Within 45 business days of WACOR direction
3.5	Specification Updates	Within 30 business days of WACOR direction
3.6	Standards Development Committees	Ongoing

Task 4 – Product Certification

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
4.1	Certification document management	Within twenty (20) business days of WACOR direction
4.2	Certification Audit	First audit report – August 30 2014 Second Audit – January 15, 2015

Task 5 – Technical Product Support

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
5.1	Green building program support	As directed by the WACOR
5.2	Marketing and outreach	As directed by the WACOR

5.3	Miscellaneous technical support	As directed by the WACOR
5.4	Energy Star program coordination	As directed by the WACOR
5.5	Life-cycle analysis	Within four (4) weeks of WACOR direction
5.6	Factoid Catalog updates	As directed by WACOR

Task 6 – New Homes

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
6.1	Specification Management	As directed by the WACOR
6.2	New homes certification system management	As directed by the WACOR
6.3	Builder resource manual and training	Within 60 business days of WACOR direction or as agreed to as reasonable by contractor and WACOR

Task 7 – Commercial and Institutional Sector Outreach

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
7.1	General CI materials	Within three (3) weeks of WACOR direction
7.2	CI Tools	Within three (3) weeks of WACOR direction
7.3	Assessment and Evaluation Tool	Within five (5) weeks of WACOR direction

Task 8 – Commercial Product Support

<i>Subtask</i>	<i>Deliverable</i>	<i>Due Date</i>
8.1	Product deployment strategy	Within three (3) weeks of WACOR direction
8.2	Program materials	Within three (3) weeks of WACOR direction

8.3	Energy Star Portfolio Manager revision	As directed by the WACOR
8.4	Evaluation of benchmark	As directed by the WACOR
8.5	Outline of Content for Webinar	Within three (3) weeks of WACOR direction
	Draft Presentation	
	Final presentation	Within four (4) weeks of WACOR direction
	Recorded presentation files	Within two (2) weeks of WACOR direction
		Within four (4) weeks of Webinar

V. MISCELLANEOUS

A. Software Applications and Accessibility

Files delivered to the Government shall be Microsoft Office 2013 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word,
- Preferred presentation format: Power Point
- Preferred graphics format: Each graphic is an individual JPEG or GIF file
- Preferred portable format: Adobe Acrobat, Version X
- Preferred tracking format: MS project or excel

B. Travel. Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. . The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume 4-6; 2-3 day trips will be required over the course of this Work Assignment as described in Task 3 and 5 above.. . One to two contractors shall attend each conference under this work assignment (though other WACORs may request additional support under their own work assignments).

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer. Information from this task shall be included in the program

database (Salesforce), as appropriate. Updates to the database shall include communications with Stakeholders such as e-mails and meeting summaries.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VI. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number B-05				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense Product Development				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.1					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance From 08/12/2014 To 02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee: \$0.00		LOE: 0						
07/18/2014 To 02/13/2015										
This Action:		\$609,775.00		6,089						
Total:		\$609,775.00		6,089						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated: 08/27/2014		Cost/Fee: \$609,775.00		LOE: 6,089						
Cumulative Approved:		Cost/Fee: \$609,775.00		LOE: 6,089						
Work Assignment Manager Name Stephanie Tanner <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number 202-564-2660 FAX Number:				
Project Officer Name Robin Danesi <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name Kathleen Rechenberg <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:				
Contracting Official Name Sandra Stargardt-Licis <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:				